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UTILITY PATENT APPLICATION TRANSMITTAL

(Only for new nonprovisional applications under 37 C.F.R. § 1.53(b))

Attorney Docket No.	1880
First Inventor or Application Identifier	LEHEW et al.
Title	Automatic and Transparent Synchronization of Server-Side State Information With a Client Application
Express Mail Label No.	EJ660777500US

APPLICATION ELEMENTS

See MPEP chapter 600 concerning utility patent application contents.

- ☒ * Fee Transmittal Form (e.g., PTO/SB/17)
(Submit an original and a duplicate for fee processing)
- ☒ Specification [Total Pages **35**]
(preferred arrangement set forth below)
 - Descriptive title of the Invention
 - Cross References to Related Applications
 - Statement Regarding Fed sponsored R & D
 - Reference to Microfiche Appendix
 - Background of the Invention
 - Brief Summary of the Invention
 - Brief Description of the Drawings (if filed)
 - Detailed Description
 - Claim(s)
 - Abstract of the Disclosure
- ☒ Drawing(s) (35 U.S.C. 113) [Total Sheets **7**]
- Oath or Declaration [Total Pages **3**]
 - ☒ Newly executed (original or copy)
 - ☐ Copy from a prior application (37 C.F.R. § 1.63(d))
(for continuation/divisional with Box 16 completed)
 - ☐ DELETION OF INVENTOR(S)
Signed statement attached deleting inventor(s) named in the prior application, see 37 C.F.R. §§ 1.63(d)(2) and 1.33(b).

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- ☐ Microfiche Computer Program (Appendix)
- Nucleotide and/or Amino Acid Sequence Submission (if applicable, all necessary)
 - ☐ Computer Readable Copy
 - ☐ Paper Copy (identical to computer copy)
 - ☐ Statement verifying identity of above copies

ACCOMPANYING APPLICATION PARTS

- ☒ Assignment Papers (cover sheet & document(s))
- ☐ 37 C.F.R. § 3.73(b) Statement (when there is an assignee) ☒ Power of Attorney
- ☐ English Translation Document (if applicable)
- ☐ Information Disclosure Statement (IDS)/PTO-1449 ☐ Copies of IDS Citations
- ☐ Preliminary Amendment
- ☒ Return Receipt Postcard (MPEP 503)
(Should be specifically itemized)
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S P E C I F I C A T I O N

TO ALL WHOM IT MAY CONCERN:

Be it known that we, Christian R. Lehew, a citizen of the United States, residing at 17525 NE 40th Street, Redmond, Washington 98052, Michael L. Waterston, a citizen of Canada, residing at 4010 Linden Avenue N., Seattle, Washington 98103, Robert A. Kleewein, a citizen of the United States, residing at 26515 SE 172nd Street, Issaquah, Washington 98027 and Ian V. Hollier, a citizen of the United Kingdom, residing at 11029 SE 271st Street, Kent, Washington 98031, have invented a certain new and useful AUTOMATIC AND TRANSPARENT SYNCHRONIZATION OF SERVER-SIDE STATE INFORMATION WITH A CLIENT APPLICATION of which the following is a specification.

AUTOMATIC AND TRANSPARENT SYNCHRONIZATION OF SERVER-SIDE
STATE INFORMATION WITH A CLIENT APPLICATION

FIELD OF THE INVENTION

5 The invention relates generally to computer systems, and more particularly to communication between a client-side computer application and a web server.

BACKGROUND OF THE INVENTION

10 Some Internet web servers often provide web pages that are personalized for each particular user based on the user's identity and state information maintained at the server for that user. For example, in electronic bill presentment technology, when a user is properly authenticated, a web page
15 is provided to the user displaying the state of that user's current financial bills. The user may pay the bills electronically, whereby the server adjusts the state information to reflect which bill has been paid, how much has been paid, and so on.

20 At the same time, many users of such custom-generated web pages run software programs on their local machine that deal with related information. For example, a user may track personal financial information, including the state of the user's bills, in an application program such as Microsoft®
25 Corporation's Money99 program.

However, there has heretofore not been a straightforward way to synchronize the state information maintained at the server with the data maintained by the client application program. For example, when a user pays a bill on an
5 electronic bill presentment server, the information is not synchronized with the user's financial data tracked by the application program. The user thus has to make a double entry, once to the server and once in the application program.

A number of solutions may be developed to perform the
10 synchronization, however each these solutions have associated drawbacks. For one, the user could manually request synchronization by clicking on a synchronize button or the like displayed on the web page. However, as can be readily appreciated, not all users will understand this action nor
15 will remember to do so, leading to inconsistencies that confuse and frustrate the user, i.e., many users would not find the link, realize what it did, and/or realize why the link should be clicked.

Another, more complex solution would be to develop a
20 customized, "behind the scenes" mechanism for communicating with electronic bill presentment servers over an Internet connection. However, because of the complexity, it is not cost-efficient to do so, and moreover, would require substantial changes at both the client and server. Yet

another solution would be to duplicate server functions at the client, and then have the client update the server. However, this would be performing the same work twice, which is undesirable, and also would lead to problems when the server
5 functions needed to be changed. Moreover, the server has the actual state data, and thus the client would still have to synchronize before presenting information to the user. Lastly, the server could determine whether a client accessing it may have some data to synchronize by modifying browsers to
10 inform the server when the browser is communicating on behalf of a client application. However, this is not a straightforward solution, nor is it backward compatible, as it would require modifying or replacing the large number of existing browsers.

SUMMARY OF THE INVENTION

Briefly, the present invention provides a system and method whereby a client application hosting a browser notifies a server its existence. Upon recognizing the client
20 application as an enhanced client, the server provides enhanced operating functionality to the client, such as by enabling continuous, silent and automatic state synchronization with a secure website that is designed for use both with and without the client application.

To notify the server of the client application's existence, before a client application hosting a browser requests a server's normally-accessible website, the client application instead provides a URL to the browser to access a special, otherwise hidden web page. The hidden web page writes awareness information (e.g., a "cookie") to a client storage to identify the client as an enhanced client.

The hidden page then automatically forwards the client to the requested website, whereby the server distinguishes the enhanced clients from ordinary clients, and modifies its behavior accordingly. For example, because the server has knowledge that the client application is present, the server and client application may communicate in the background, such as to synchronize the client application's data with server state information. To synchronize, the server data may be written into a client storage mechanism, or the server data may be passed through the client browser as a tagged image file or a file resembling a media file.

Other advantages will become apparent from the following detailed description when taken in conjunction with the drawings, in which:

BRIEF DESCRIPTION OF THE DRAWINGS

FIGURE 1 is a block diagram representing a computer system into which the present invention may be incorporated;

FIG. 2 is a block diagram representing a general architecture into which the present invention may be incorporated;

FIG. 3 is a block diagram representing how a client and server communicate data over time in accordance with one aspect of the present invention;

FIG. 4 is a representation of financial bill data for an exemplary application;

FIG. 5 is a flow diagram generally representing the steps taken to prepare a client for enhanced communication with a server in accordance with one aspect of the present invention;

FIG. 6 is a flow diagram generally representing the steps taken at the server to provide additional data to enhanced clients in accordance with one aspect of the present invention; and

FIG. 7 is a block diagram representing general components for synchronizing and/or linking downloaded server state information with client user application data.

DETAILED DESCRIPTION OF THE PREFERRED EMBODIMENT

Exemplary Operating Environment

FIGURE 1 and the following discussion are intended to provide a brief general description of a suitable computing
5 environment in which the invention may be implemented.

Although not required, the invention will be described in the general context of computer-executable instructions, such as program modules, being executed by a personal computer.

Generally, program modules include routines, programs,
10 objects, components, data structures and the like that perform particular tasks or implement particular abstract data types.

Moreover, those skilled in the art will appreciate that the invention may be practiced with other computer system

15 configurations, including hand-held devices, multi-processor systems, microprocessor-based or programmable consumer

electronics, network PCs, minicomputers, mainframe computers and the like. The invention may also be practiced in

distributed computing environments where tasks are performed by remote processing devices that are linked through a

20 communications network. In a distributed computing environment, program modules may be located in both local and remote memory storage devices.

With reference to FIG. 1, an exemplary system for implementing the invention includes a general purpose

computing device in the form of a conventional personal computer 20 or the like, including a processing unit 21, a system memory 22, and a system bus 23 that couples various system components including the system memory to the

5 processing unit 21. The system bus 23 may be any of several types of bus structures including a memory bus or memory controller, a peripheral bus, and a local bus using any of a variety of bus architectures. The system memory includes

10 read-only memory (ROM) 24 and random access memory (RAM) 25. A basic input/output system 26 (BIOS), containing the basic routines that help to transfer information between elements within the personal computer 20, such as during start-up, is stored in ROM 24. The personal computer 20 may further

15 include a hard disk drive 27 for reading from and writing to a hard disk, not shown, a magnetic disk drive 28 for reading from or writing to a removable magnetic disk 29, and an optical disk drive 30 for reading from or writing to a removable optical disk 31 such as a CD-ROM or other optical media. The hard disk drive 27, magnetic disk drive 28, and

20 optical disk drive 30 are connected to the system bus 23 by a hard disk drive interface 32, a magnetic disk drive interface 33, and an optical drive interface 34, respectively. The drives and their associated computer-readable media provide non-volatile storage of computer readable instructions, data

structures, program modules and other data for the personal computer 20. Although the exemplary environment described herein employs a hard disk, a removable magnetic disk 29 and a removable optical disk 31, it should be appreciated by those skilled in the art that other types of computer readable media which can store data that is accessible by a computer, such as magnetic cassettes, flash memory cards, digital video disks, Bernoulli cartridges, random access memories (RAMs), read-only memories (ROMs) and the like may also be used in the exemplary operating environment.

A number of program modules may be stored on the hard disk, magnetic disk 29, optical disk 31, ROM 24 or RAM 25, including an operating system 35 (preferably Windows NT), one or more application programs 36, other program modules 37 and program data 38. A user may enter commands and information into the personal computer 20 through input devices such as a keyboard 40 and pointing device 42. Other input devices (not shown) may include a microphone, joystick, game pad, satellite dish, scanner or the like. These and other input devices are often connected to the processing unit 21 through a serial port interface 46 that is coupled to the system bus, but may be connected by other interfaces, such as a parallel port, game port or universal serial bus (USB). A monitor 47 or other type of display device is also connected to the system

bus 23 via an interface, such as a video adapter 48. In addition to the monitor 47, personal computers typically include other peripheral output devices (not shown), such as speakers and printers.

5 The personal computer 20 may operate in a networked environment using logical connections to one or more remote computers, such as a remote computer 49. The remote computer 49 may be another personal computer, a server, a router, a network PC, a peer device or other common network node, and typically includes many or all of the elements described above relative to the personal computer 20, although only a memory storage device 50 has been illustrated in FIG. 1. The logical connections depicted in FIG. 1 include a local area network (LAN) 51 and a wide area network (WAN) 52. Such networking environments are commonplace in offices, enterprise-wide computer networks, Intranets and the Internet.

When used in a LAN networking environment, the personal computer 20 is connected to the local network 51 through a network interface or adapter 53. When used in a WAN networking environment, the personal computer 20 typically includes a modem 54 or other means for establishing communications over the wide area network 52, such as the Internet. The modem 54, which may be internal or external, is connected to the system bus 23 via the serial port interface

46. In a networked environment, program modules depicted relative to the personal computer 20, or portions thereof, may be stored in the remote memory storage device. It will be appreciated that the network connections shown are exemplary and other means of establishing a communications link between the computers may be used.

CLIENT EXISTENCE NOTIFICATION FOR ENHANCED DATA COMMUNICATION

In general, the present invention provides a method and system via which a client application 60 (FIG. 2) of a client machine_A (such as the computer system 20) notifies a server 62 of its existence, enabling continuous, silent and automatic state synchronization with a secure website 64 that is designed for use both with and without the client application 60. To this end, the system and method include a highly flexible architecture as described below that enables the client application to identity itself to the server without modifying the code of existing browsers. While the present invention was originally implemented in a financial environment and thus includes financial-based client and server examples, it should be understood that the present invention is not limited to financial applications, but instead has numerous applications throughout user computing. Moreover, although the various components are shown and

described herein as separate components because of certain benefits resulting from separated functionality, it can be readily appreciated that some or all of the components may be combined into more complex components, and/or separated even
5 further into additional components.

As represented in FIGS. 2 and 3 of the drawings, the client application 60 such as Microsoft® Corporation's Money99 hosts a web browser 66 (*in-situ*) such as Microsoft® Corporation's Internet Explorer, to enable users to view web
10 pages 68₁ - 68_n of the server 62. By way of example, one such server (e.g., the server 62) may provide electronic bill presentment, whereby authenticated users have a personalized web page (e.g., 68_{2A}) sent thereto via which the users can see their bills and make electronic payments on those bills. For
15 example, as represented in the partially-rendered web page 68_{2A} of FIG. 4, a representation 70₁ of one bill (e.g., a monthly instance 70₁ of a bill model) may be generated for a telephone bill, another representation 70₂ for a first cellular bill, and so forth, generally ordered by date. Note that although only
20 one server 62 and website 64 is shown in FIGS. 2 and 3, it is understood that the web pages 68₁ - 68_n may be distributed among many websites and/or servers.

As represented in FIG. 3, a user, such as from a different client machine_B 72 that is not accessing the bill

presentment server 62 through the client application 60, but rather directly through a browser 74, (or another application hosting the browser 74), will be provided with a normal logon page, e.g., 68_{1B}. This is represented by the arrow labeled
5 with circled letter "A" in FIG. 3. Of course, the server 62 first may provide other web pages (e.g., a home page) with a link to the logon page 68_{2B}, but to see secure personalized information, the user ultimately will need to be authenticated via the logon page 68_{2B} or in some other manner. When the page
10 68_{2B} is rendered by the browser 74 of machine 72, the user provides logon information (arrow with circled letter "B"), which is passed to the server 62 (arrow with circled letter "C") or some other authentication mechanism. If the user is authenticated by the server 62, which may occur in a well-
15 known manner, the server 62 generates and provides the user with a personalized web page 68_{2B} of bill information (the arrows labeled with circled letters D and E).

In accordance with one aspect of the present invention, when the client application 60 (e.g., on the computer system
20 20) hosts the browser 66, the client application 60 does not direct the browser 66 to the logon page or other normally accessible page of the website 64. Instead, when a user wishes to receive a personalized bill presentment page 68_{2A}, the client application 60 provides the hosted browser 66 with

a URL (Uniform Resource Locator) of a hidden (out-of-band) page 76. The page can be kept hidden from the user by redirecting the browser to a second visible page after the hidden page has been downloaded. Essentially, only the client application 60 knows of this hidden page 76, although there are straightforward ways (e.g., via a client identifier) to ensure that only proper clients may use the hidden page 76. The client application 60 further may pass application data 78 (FIG. 2) to the hidden page URL 76 as part of the URL string it passes to the browser 66 when requesting access thereto. As described below, this data 78 may include the current state of the client application's data such as via a timestamp recording the last time the client application 60 was synchronized with server state information. The passed data 78 may be in virtually any agreed-upon format, and may also include information such as a program identification number, a URL specifying the visible page for the browser to be passed to, unique client instance identifiers, and user authentication information. In FIG. 2, the transmission of the client application data 78 is represented as a small diamond, while in FIG. 3, the providing of the hidden page 76, access thereto, and passing of the data client application data 78 is represented by the arrows labeled with circled numerals one (1) and two (2). In FIG. 3, the values of the

circled numerals generally represent the time-order of a typical communication sequence and the actions resulting therefrom. Note that the user is not intended to realize that this hidden page 76 has been accessed, e.g., the browser 66 typically gets redirected by the server to a visible page at this time.

In accordance with another aspect of the present invention, by properly accessing the hidden page 76, the client application 60 will be considered an enhanced application by the server 62. To identify the client application 60 as enhanced, the hidden page 76 writes client awareness data 80 (essentially a cookie) through the web browser 66 to a client storage mechanism 82. In FIG. 2, the passing of the client awareness data 80 is represented by a small triangle, while in FIG. 3, the arrow labeled with circled numeral three (3) represents the writing of this cookie to the client.

Once the client awareness data 80 is written, the hidden page 76 silently (i.e., without user interface) forwards the client to another URL page of the website 64. For example, in order to identify a Money99 client application to the bill presentment website 64, on the request for the bill summary list, the browser 66 may be given a URL string that includes:

http://www.transpoint.com/MakeMoneyCookie.asp?URL=
http://www.transpoint.com/summarylist.asp

5

The http://www.transpoint.com/MakeMoneyCookie.asp page creates the client awareness data (session cookie) on the user's machine as described above, and then redirects to the URL specified as the argument (http://www.

10

transpoint.com/summarylist.asp). The ASP page that creates the session cookie will most likely be at the bill publisher site, since they are likely to want to download information to enhanced clients, however this is not a requirement. For example, in the case of XYZ Bank, the string may include:

15

http://www.transpoint.com/MakeMoneyCookie.asp?URL=
http://www.xyzbank.com/summarylist.htm

20

For security purposes, the browser 66 may be first redirected to a logon page 68_{1A} as represented in FIG. 3 by the arrow labeled with circled numeral four (4), whereby the user may enter authentication credentials, represented by the arrows labeled with circled numerals five (5) and six (6). Note that by interacting through the browser 66 to obtain credentials via information recorded in the client application program 60, the hidden page 76 may take care of the authentication without the need for additional user input following each request for bill presentment.

At this time, a properly authenticated user may receive personalized information from the server 62. In keeping with the present invention, however, as shown in FIG. 3 the server 62 further determines whether the client is enhanced by requesting the client awareness data 80 from the client via the browser 66. If the client has the proper awareness data 80, the client will be considered enhanced and receive additional information and/or operating functionality from the server 62, otherwise the client will be considered non-enhanced, e.g., incapable of handling the additional information. In this manner, ordinary browsers may still access the website 64 in the normal manner without noticing any change in operation, while enhanced clients, i.e., browsers hosted by proper client application programs will be provided with extended functionality and may dynamically modify their behavior accordingly. Note that the client awareness data 80 may include the client application data 78 passed to the hidden web page 76, e.g., so that the server may obtain the timestamp when the server checks for the client awareness data 80. The arrows labeled with circled numerals seven (7) and eight (8) in FIG. 3 represent the retrieval by the server 62 of the client awareness data 80 associated with the client application program 60.

To summarize, as shown in FIG. 5 beginning at steps 500 - 502, the client application 60 provides a URL that corresponds to the hidden web page 76 along with client application data 78, and passes the constructed URL string to the browser 66, first loading the browser 66 if needed. When the hidden web page 76 is accessed, the client awareness data 80, which may incorporate the client application data 78, is implanted to the client storage 82 at step 504. Step 506 (shown as a dashed box to indicate optional) represents the validation of the user by the hidden page 76, while step 510 represents the redirection of the client browser 66 to the normal website 64. Note that if the hidden web page 76 does not perform the authentication at step 506, the redirection to the normal website 64 at step 510 may be to an appropriate logon page that facilitates the authentication.

Returning to FIGS. 2 and 3, at this time, the server 62 has validated the user and via the client awareness data 80 has also recognized the browser 66 as an enhanced client, i.e., as being hosted by an enhanced client application 60 in the present example. The server 62 is thus aware that it may perform some enhanced operation with respect to the client, e.g., send additional information to the client application 60, allow access to different web pages, and so on. In FIG. 2, a plus sign represents the movement of the server state

data 84 through the various components. Note that the authentication or the like used for generating the personalized bill summary page 68_{2A} provided at the logon page 68_{1A} may be used to provide security for downloading the additional information, without requiring the user to re-enter the credentials.

The modified server behavior is based on recognition of existence of the proper client application, as opposed to differentiation solely by user credentials. By way of example, the server 62 may provide its enhanced clients with pages having a different color scheme, so that when a user connects through the client application 60, the enhanced status is more recognizable to users. Non-enhanced clients may receive pages with a different color scheme, and possibly a warning informing them that any state changes made (e.g., a bill payment) will not be synchronized with any local application program (e.g., personal financial application software) on their local machine. This warning may be limited to being displayed only to non-enhanced users who have previously connected as enhanced clients, by maintaining some additional state information for each such user at the server 62.

A first way in which to provide additional information (e.g., server state data 84) to the enhanced client 60 is to

send the information as a cookie, whereby as with other persistent cookies, the browser 66 writes the server state data 84 to the client side storage 82 for the client application to access. The timestamp provided in the client application data 78 and maintained in the client awareness data 80 may be first checked to determine if the data is needed at the client, and if so, what amount of data is needed. For example, to synchronize bill payments made at the server 62 with the user's application data, (e.g., maintained in bill models representing those bills), only the payment information since the last-synchronized time need be communicated in the server state information 84. The state information 84 for this particular client may be sent before the bill summary page 68_{2B} personalized therefor is sent, after it is sent, or at the same time it is sent, as generally represented in FIG. 3 by the arrows accompanied by circled numerals nine (9) through twelve (12). Once written to the client storage 82, the client application 60 may then read the storage mechanism 82 as necessary to find the cookie and obtain the information therein, for example, on some time interval or as the browser 66 navigates.

In an alternative implementation, the server 62 may include the additional information in a web page, such as in the bill summary web page 68_{2A} (HTML) provided to the user. To

this end, when the server 62 detects an enhanced client 60,
the server 62 includes a new image tag on the summary web page
68_{2A} indicating a source. The source for this image tag is not
actually an image, but rather a file of the server state data
5 for that client having a content type and an extension (e.g.,
ofx, a file format used for storing financial data) that is
registered with the client application 60, whereby the client
application 60 is passed the file automatically after the
download. A special moniker can also be registered with the
10 client application so that information following the moniker
is passed by the browser to the client application. By using
the special moniker in the image tag, the server can specify a
file for the client application to download. The dashed line
in FIG. 3 from the server state data 84 into the bill summary
15 page 68_{2A} represents this alternative way of communicating the
additional information. For example, the following may be
used to perform the download:

```
<img src =  
"money:onlinedownloadebpp+http://www.msfdc.com/money.asp+UserI  
20 dl23" height=1 width=1>
```

In this case, the string "money:" is an instruction to
the client web browser to run a function registered with the
string "money:" This function is uses the remainder of the
25 string

("onlinedownloadebpp+http://www.msfdc.com/money.asp+UserId123"
) to determine that the server wants it to download the OFX
data from the bill presentment web site using the URL
http://www.msfdc.com/money.asp+UserId123. In this way, it is
5 the server that knows that it has data to download, but it is
the client that actually initiates the data transfer. The
download will be automatically performed when the page is
rendered. This will result in a one pixel-by-one pixel bitmap
being displayed on the screen, which will not be very
10 noticeable to most users.

Instead of using an image tag, the browser can also be
instructed to download the .ofx file by client-side script
contained in the page. For example, the following code will
instruct the browser to download the file:

```
15 <SCRIPT FOR=window EVENT=onload LANGUAGE="javascript">  
window.location=https://ebills.transpoint.com/money.ofx  
</SCRIPT>
```

In another implementation, the system registry in the
client machine 20 may be modified to treat a specific
20 extension as if it were a media type such that the browser 66
does not provide any user interface prior to the download.
The HTML page returned includes a tag that causes the browser
to attempt to "play" a media type (audio/video) on the client
machine. The source for that media is not actually media, but

rather the server state information file 84 that includes the updated data for the data the client application. The client application 60 is registered with the system as a media player, whereby when the browser 66 invokes it to play the media type, the incoming data stream is read and processed without displaying any user interface. As can be appreciated, displaying file download options on a user interface may confuse users at this time since most users will not realize that any download and synchronization operation is taking place.

FIG. 6 generally summarizes the operation of various aspects of the present invention following the writing of the client awareness data 80 to the client storage 82. At steps 600 - 602, the server 62 checks for the client awareness data 80. If present, the server 62 recognizes the client as an enhanced client, whereby at step 604 the server 62 provides enhanced functionality, e.g., provides the client with additional data by adding it to the output stream or writing a cookie as described above. As can be appreciated, other server 62 operations and behaviors may be varied based on whether a client is enhanced.

FIG. 7 generally represents components for synchronizing the additional information in the exemplary financial application environment. To be synchronized, the presented

bill information needs to be linked to the bill model of the application program. For example, three pieces of information in the presented bill may be used to establish a link to the application's bill model, e.g., a bill publisher identifier, a biller identifier and an account identifier which when used together, uniquely identify to which model a downloaded bill belongs.

As shown in FIG. 7, when the server state data 84 is downloaded, possibly including some unknown information 90, a correlation / synchronization mechanism 92 processes the information to update the users' client application data as appropriate. By way of illustration of how the changed server behavior may benefit enhanced clients, the following generally sets forth the process performed by the correlation / synchronization mechanism 92 in walking through a list of downloaded presented bills and linking to models:

```
for (each downloaded presented bill) {
    if (any downloaded bills have not been linked to models or
        account numbers are unknown) {
        show wizard start screen
        for (each unlinked or account number unknown) {
            if (presenter model ID does not exist in any model)
            {
                display model matching screen
                if (matched to an existing model) {
                    if (model already linked with different
                        presentment info) {
                        display already linked screen
                    }
                    else if (model setup as an Apay) {
                        display OK Apay warning dialog:
                    }
                }
            }
        }
    }
}
```

You cannot match this E-bill to the bill you have selected because it has been set up in Money as an automatic payment (Apay).
To cancel a scheduled automatic payment, go to the Bills & Deposits area in Money and, in the left pane, click Setup Bills & Deposits. Select the Apay you want to cancel, and then click Delete at the bottom of the screen.

[OK]

```

    }
    else
        override model payment method
        if (payee name on downloaded bill != payee
            name on model)
            display payee correction screen
        }
        link to model
    }
    if (downloaded bill was paid)
        if (account number has not been linked to Money
            account)
            display account matching screen
    }
    show wizard end screen
}
if (downloaded bill is linked to a model) {
    if (downloaded bill was paid) {
        record paid bill into appropriate account register
        checking to ensure it is not already there; if already
        there update amount, date, and VOID status if necessary;
        ignore non-existing VOID downloaded bill.
        Store category/payee from next instance into
        recorded transaction if confirmed.
        let user fix invalid split data in same manner as
        downloaded statement tran.
    }
    else {
        store amount, date, and bill URL into next instance
        of matching model.
        let user fix invalid split data in same manner as
        downloaded statement tran.
    }
}
}

```

As can be understood from the above process, one or more
suitable user interface dialogs 94 or the like are displayed

5 to the user to correlate any unknown bill information 90 to an

appropriate bill model of the client application program 60.

The correlation information 96 to link to the appropriate application's bill models 98 (bill publisher identifier, biller identifier, account identifier) is stored such that the
5 user will not ordinarily receive the user interface dialogs again.

As can be seen from the foregoing detailed description, there is provided a method and system which a client application hosting a browser notifies a server of its
10 existence, enabling continuous, silent, and automatic state synchronization with a secure website designed for use both with and without the client application. Recognized clients are given enhanced server functionality, for example, to download server state information thereto. The method and
15 system are flexible and extensible, and straightforward to implement, e.g., without requiring changes to browsers, duplication of server functions, or a complex custom-built solution.

While the invention is susceptible to various
20 modifications and alternative constructions, certain illustrated embodiments thereof are shown in the drawings and have been described above in detail. It should be understood, however, that there is no intention to limit the invention to the specific form or forms disclosed, but on the contrary, the

intention is to cover all modifications, alternative constructions, and equivalents falling within the spirit and scope of the invention.

WHAT IS CLAIMED IS:

1. A computer-readable medium having computer-executable instructions, comprising:
 - accessing a hidden web page via a request from a client application program;
 - receiving information from the hidden web page;
 - writing the information to a client storage;
 - providing a server with data corresponding to the information received from the hidden web page written into the client storage; and
 - receiving state information from the server based on the data provided thereto.
2. The computer-readable medium having computer-executable instructions of claim 1 wherein accessing a hidden web page includes invoking a browser from the client application.
3. The computer-readable medium having computer-executable instructions of claim 1 wherein accessing a hidden web page includes passing data to the hidden web page.
4. The computer-readable medium having computer-executable instructions of claim 3 wherein the data passed to

the hidden web page includes time information indicative of a synchronization time with the server state information.

5. The computer-readable medium having computer-executable instructions of claim 3 wherein receiving information from the hidden web page includes receiving at least some of the data passed thereto.

6. The computer-readable medium having computer-executable instructions of claim 1 wherein receiving state information from the server includes receiving data maintained at the server for synchronizing with data of the client application program.

7. The computer-readable medium having computer-executable instructions of claim 6 wherein the data maintained at the server is financial data.

8. The computer-readable medium of claim 6 having further computer-executable instructions for synchronizing the state information with data of the client application program.

9. The computer-readable medium of claim 1 having further computer-executable instructions for linking the state information to data of the client application program.

10. The computer-readable medium having computer-executable instructions of claim 1 wherein receiving state information from the server includes receiving in a page of data an image tag identifying a source of the state information.

11. The computer-readable medium having computer-executable instructions of claim 1 wherein receiving state information from the server includes receiving in a page of data an image tag identifying a registered media type.

12. The computer-readable medium having computer-executable instructions of claim 1 wherein receiving state information from the server includes receiving a cookie written into a client-side storage.

13. The computer-readable medium having computer-executable instructions of claim 1 wherein providing a server with data includes providing the server with a timestamp of a synchronization time of server state information.

14. The computer-readable medium having computer-executable instructions of claim 1 wherein providing a server with data includes providing the server with a client identifier.

15. The computer-readable medium of claim 1 having further computer-executable instructions for providing authentication information to the server.

16. A computer-readable medium having computer-executable instructions, comprising:

providing a hidden web page;

receiving a request from a client to access the hidden web page;

communicating information from the hidden web page to the client; and

redirecting the client to another web page.

17. The computer-readable medium of claim 16 having further computer-executable instructions for requesting awareness information at a server from the client, the awareness information corresponding to information communicated thereto from the hidden web page.

18. The computer-readable medium of claim 17 having further computer-executable instructions for determining whether the awareness information is received, and if so, providing state information to the client.

19. The computer-readable medium having computer-executable instructions of claim 18 wherein providing the state information includes, attaching the state information to a personalized web page generated at the server for the client.

19. The computer-readable medium having further computer-executable instructions of claim 16 wherein redirecting the client to another web page includes redirecting the client to a logon page.

20. The computer-readable medium of claim 16 having further computer-executable instructions for receiving authentication information from the client at the other web page.

21. The computer-readable medium of claim 16 having further computer-executable instructions for providing a personalized web page to the client.

22. The computer-readable medium of claim 16 having further computer-executable instructions for receiving data from the client corresponding to information communicated from the hidden web page to the client.

23. The computer-readable medium having computer-executable instructions of claim 22 wherein the data received from the client includes a timestamp for synchronizing server state data therewith.

24. The computer-readable medium of claim 23 having further computer-executable instructions for communicating state data to the client based on the timestamp.

25. A system for enhanced communication between a server and a client, comprising,

a client including an application program and a browser;
a server connected to the client via a transmission medium;

a hidden web page accessed by the browser for the client application, the web page providing awareness data for writing to a storage of the client;

a server web page, the browser redirected thereto and providing the server with the awareness data provided by the hidden web page; and

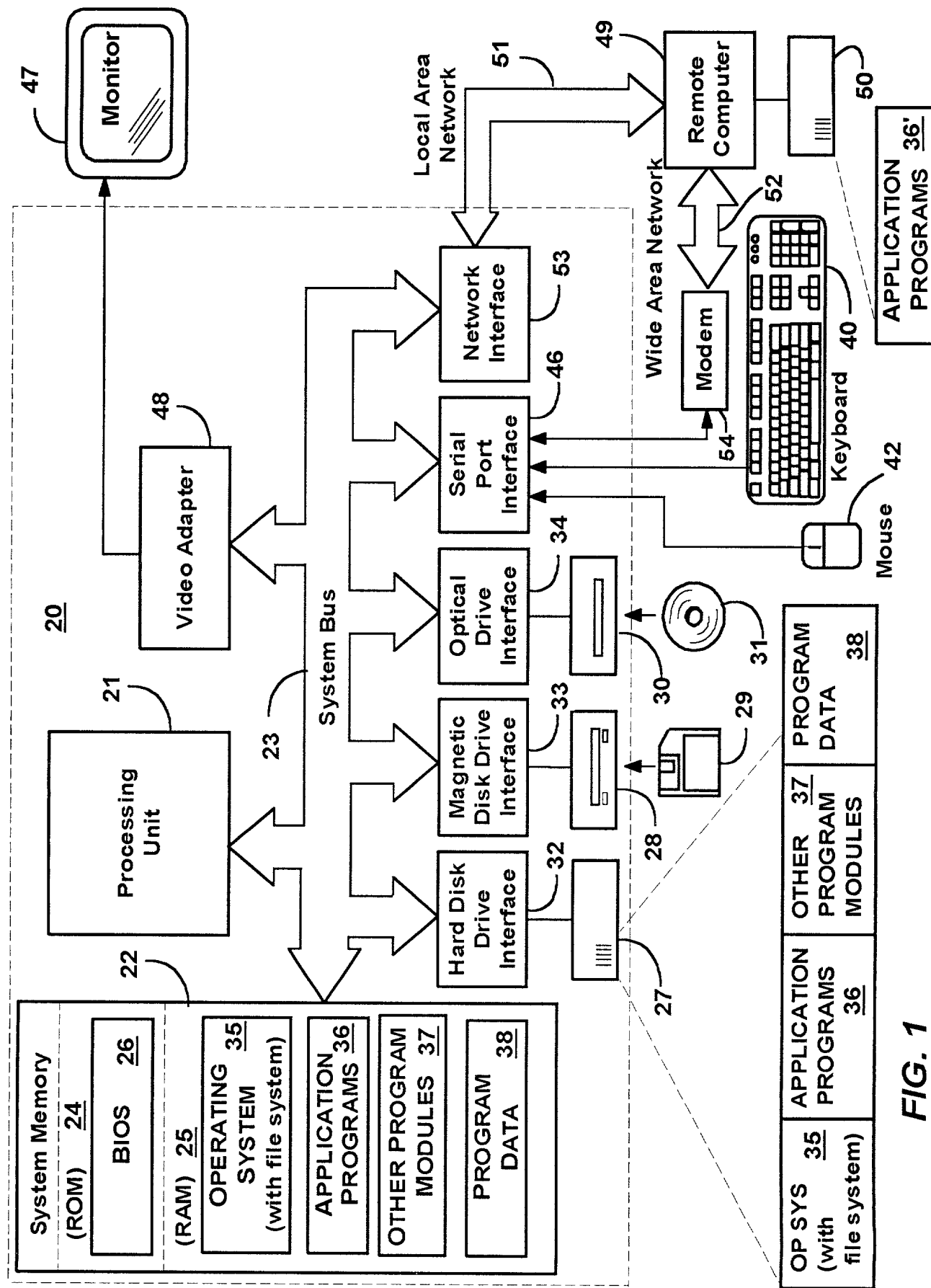
the server varying information outputted to the client based on the receipt of the awareness data.

26. The system of claim 25 wherein the client provides information to the server indicative of the state of client data.

27. The system of claim 26 wherein the server outputs information to the client to synchronize the client data.

ABSTRACT

A method and system via which a client application hosting a browser notifies a server its existence, whereby the server provides enhanced operating functionality to the client. The enhanced functionality may include enabling continuous, silent and automatic state synchronization with a secure website that is designed for use both with and without the client application. Before a client application requests a server's normally-accessible website, the client application instead provides a URL to a hosted browser to access a special, otherwise hidden web page. The hidden web page writes awareness information (e.g., a "cookie") to a client storage identifying the client as an enhanced client. The hidden page then automatically forwards the client to the requested website, whereby the server distinguishes the enhanced clients from ordinary clients, and modifies its behavior accordingly. For example, because the server has knowledge that the client application is present, the server and client application may communicate in the background, such as to synchronize the client application's data with server state information. To synchronize, the server data may be written into a client storage mechanism, or the server data may be passed through the client browser as a tagged image file or a file resembling a media file.



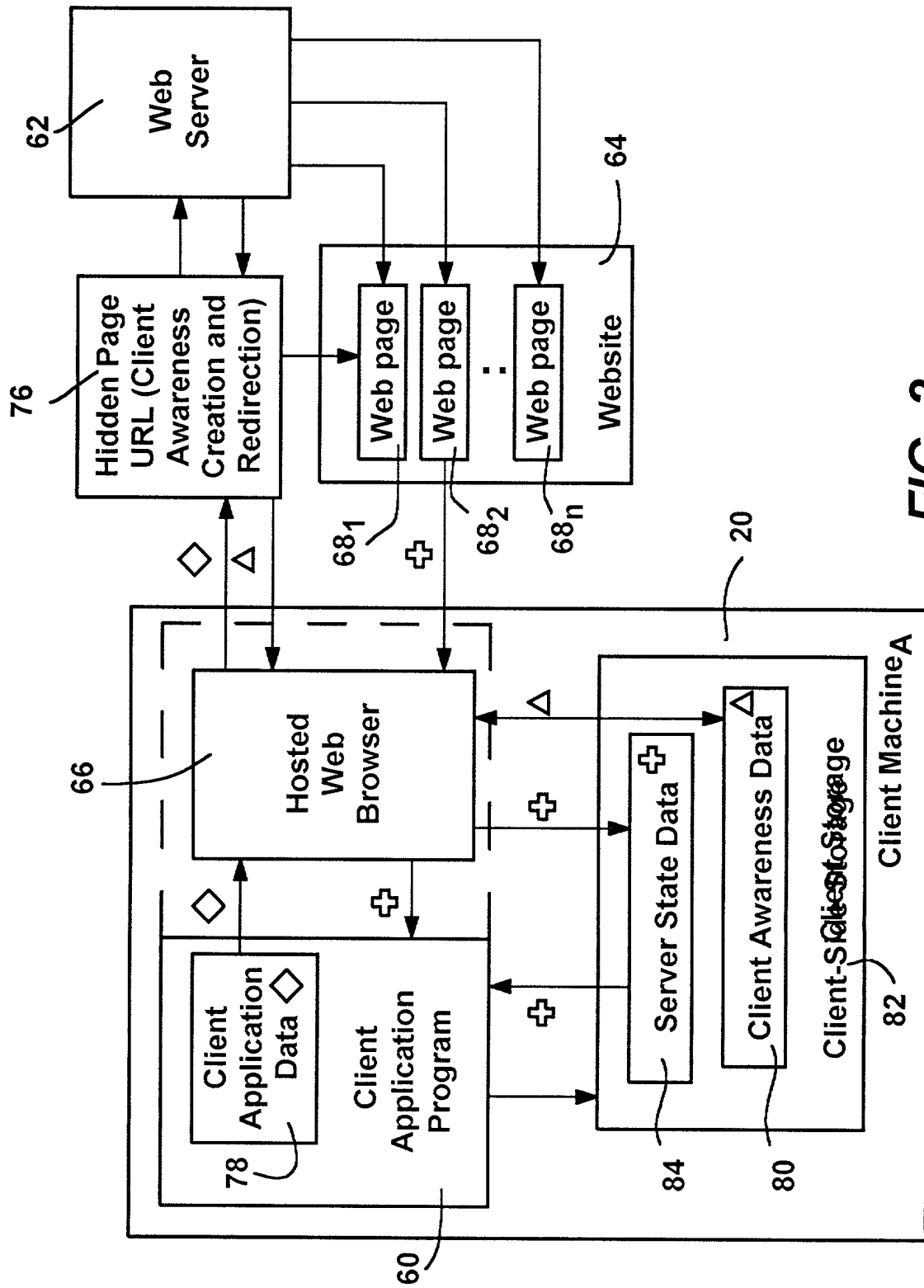


FIG. 2

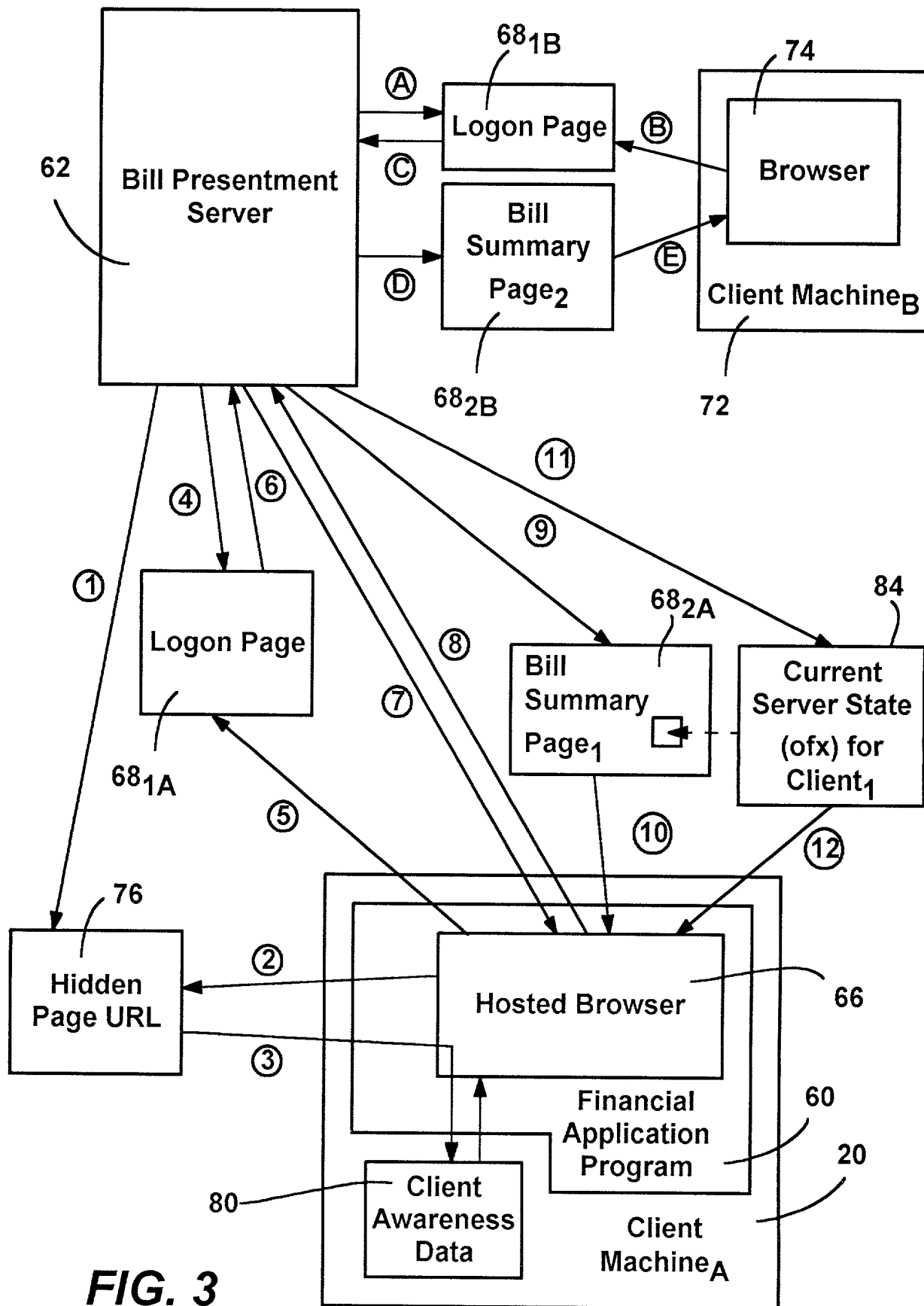


FIG. 3

Your unpaid bills are listed below. Click the biller name to open the bill and pay it.

Unpaid Bills					
Date Received	Company	Date Due:	Minimum Due:	Total Due:	
5/23/99	<u>The Long Distance Phone Co.</u>	6/23/99	\$48.14	\$48.14	701
5/25/99	<u>123 Cellular UserHusband</u>	6/25/99	\$45.00	\$857.53	702
6/14/99	<u>XYZ Credit Card Co.</u>	7/14/99	\$100.00	\$1,250.00	703
6/22/99	<u>123 Cellular UserWife</u>	7/22/99	\$45.00	\$857.53	704

FIG. 4

FIG. 5

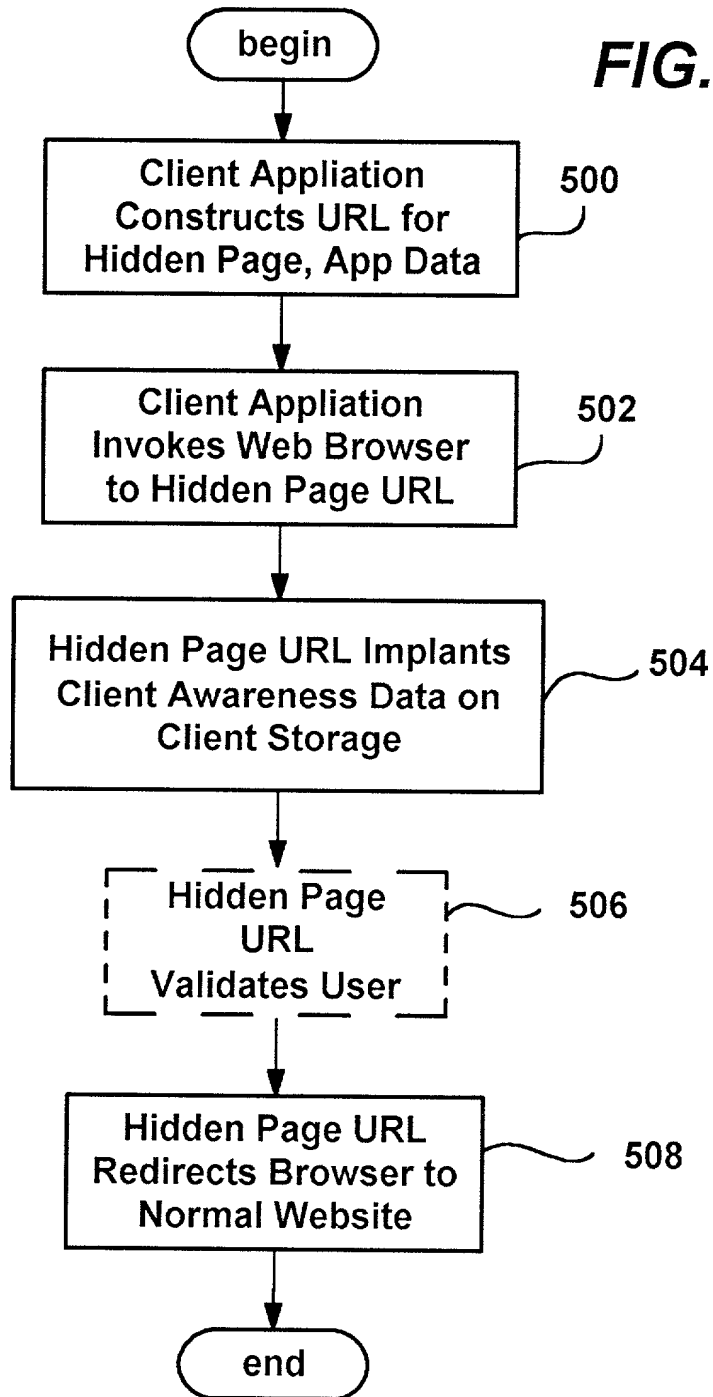
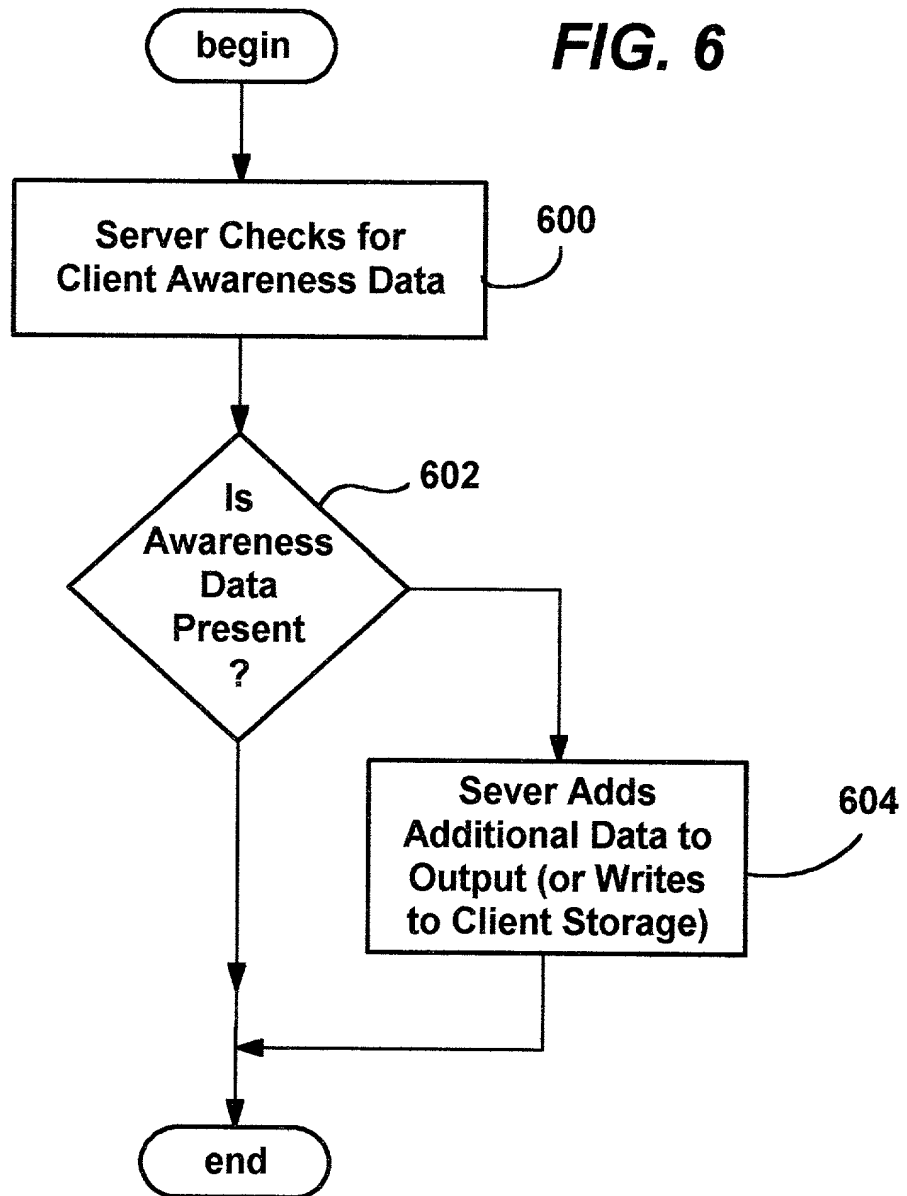


FIG. 6



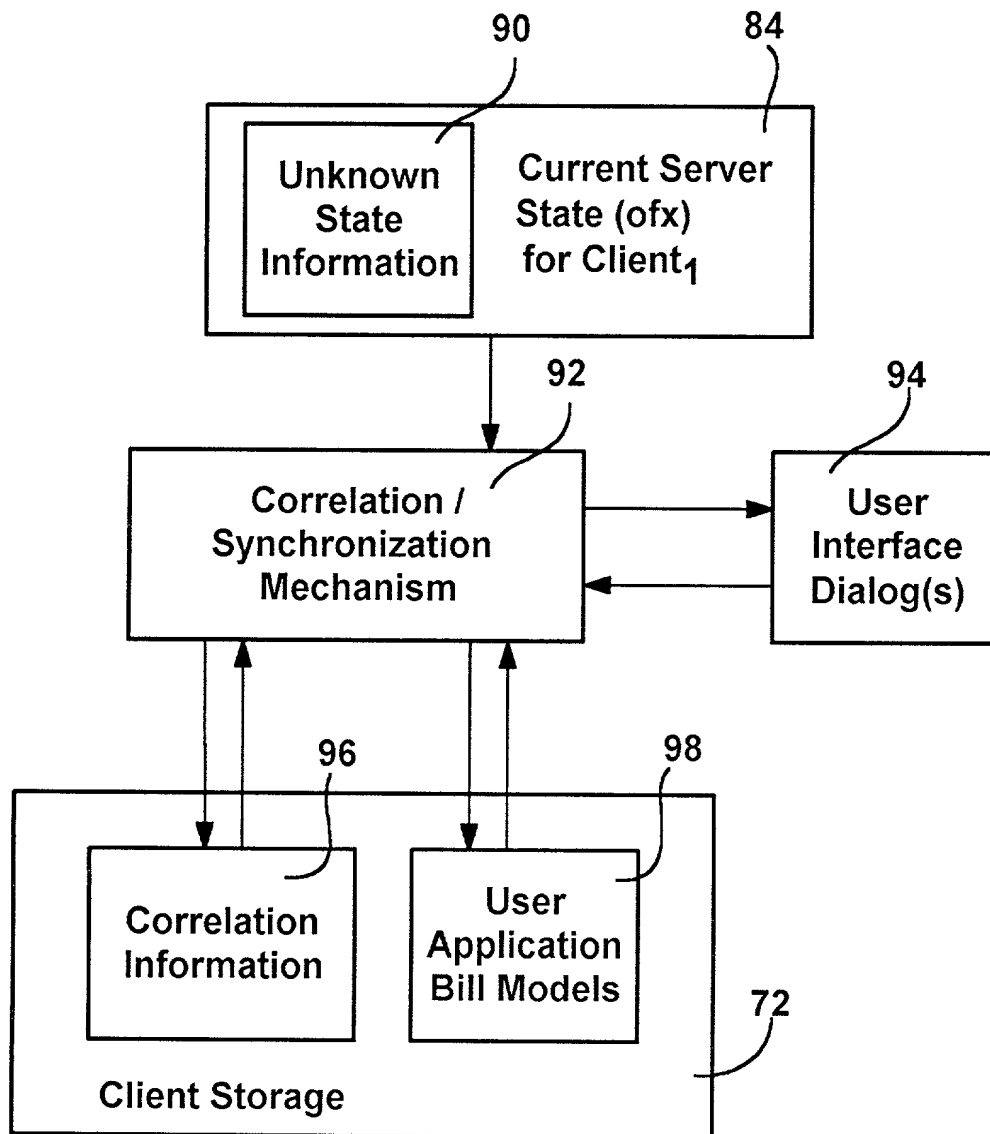


FIG. 7

COMBINED DECLARATION AND POWER OF ATTORNEY

As a below named inventor, I hereby declare that

My residence, post office address, and citizenship are as stated below next to my name.

I believe I am the original, first, and sole inventor (if only one name is listed below) or an original, first, and joint inventor (if plural names are listed below) of the subject matter which is claimed and for which a patent is sought on the invention entitled: **"Automatic and Transparent Synchronization of Server-Side State Information with a Client Application,"** the specification of which is attached hereto unless the following box is checked:

☐ was filed on _____ as United States Application Serial No. _____ or PCT International Application No. _____ and was amended on _____ (if applicable).

I hereby state that I have reviewed and understand the contents of the above-identified specification, including the claims, as amended by any amendment referred to above.

I acknowledge the duty to disclose information which is material to patentability as defined in 37 C.F.R. § 1.56.

I hereby claim foreign priority benefits under 35 U.S.C. § 119(a)-(d) or § 365(b) of any foreign application(s) for patent or inventor's certificate, or § 365(a) of any PCT international application which designated at least one country other than the United States of America, listed below and have also identified below, by checking the box, any foreign application for patent or inventor's certificate, or PCT international application having a filing date before that of the application on which priority is claimed.

Prior Foreign Application(s)

Priority Not Claimed

_____ (Number)	_____ (Country)	_____ (Day/Month/Year Filed)	<input type="checkbox"/>
_____ (Number)	_____ (Country)	_____ (Day/Month/Year Filed)	<input type="checkbox"/>

I hereby claim the benefit under 35 U.S.C. § 119(e) of any United States provisional application(s) listed below.

_____ (Application Number)	_____ (Filing Date)
_____ (Application Number)	_____ (Filing Date)

I hereby claim the benefit under 35 U.S.C. § 120 of any United States application(s), or § 365(c) of any PCT international application(s) designating the United States of America, listed below and, insofar as the subject matter of each of the claims of this application is not disclosed in the prior United States or PCT International application(s) in the manner provided by the first paragraph of 35 U.S.C. § 112, I acknowledge the duty to disclose information which is material to patentability as defined in 37 C.F.R. § 1.56 which became available between the filing date of the prior application(s) and the national or PCT international filing date of this application.

_____ (Application Number)	_____ (Filing Date)	_____ (Status – patented, pending, abandoned)
_____ (Application Number)	_____ (Filing Date)	_____ (Status – patented, pending, abandoned)

As a named inventor, I hereby appoint the following attorneys to prosecute this application and to transact all business in the Patent and Trademark Office connected therewith:


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I hereby declare that all statements made herein of my own knowledge are true, that all statements made on information and belief are believed to be true; and further that these statements were made with the knowledge that willful false statements and the like so made are punishable by fine or imprisonment, or both, under Section 1001 of Title 18 of the United States Code and that such willful false statements may jeopardize the validity of the application or any patent issued thereon.

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Inventor's signature: 

Date: 6/28/99

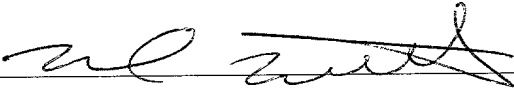
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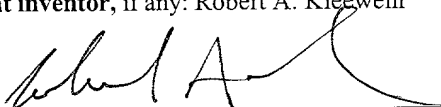
Post Office Address: Same



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Inventor's signature



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6/29/99

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Additional inventors are being named on separately numbered sheets attached hereto.
1880 declaration